



## Third-Party Fundraiser Toolkit



### Our Mission

Casa Youth Shelter serves and nurtures youth in crisis with shelter, counseling, and support services, empowering them to come through their crisis with increased confidence, stability, and tools for continued growth.

## Third-Party Fundraiser Information

Thank you so much for your interest in supporting Casa Youth Shelter by hosting a fundraising event! Your generous efforts and support will provide hope and help to youth and families in crisis. Proceeds from your fundraising event will directly assist youth in need of shelter, counseling, and immediate care.

### What is a Third-Party Fundraiser?

A third-party fundraiser is organized by community members to raise funds on behalf of Casa Youth Shelter. These events are hosted by and/or paid for by the sponsor, and the proceeds generated support the mission of the organization.

### Fundraising Ideas

Event fundraiser options are endless, from concerts to barbeques, garage sales, car washes or happy hours. We encourage you to be creative and personalize your fundraiser to what works best for you.

- Birthdays and Celebrations: Ask friends and family to donate to Casa Youth Shelter instead of giving gifts.
- School Events: Talk to your school about doing a drive, or donating a portion of ticket proceeds from events to Casa Youth Shelter.
- Workplace Campaigns: Payroll deductions, employee happy hours, casual dress Fridays. Ask your employer if they will match your donations.
- Tournaments: Basketball, golf, volleyball, board games, video games, and more! Set up a tournament of your choice to raise money for Casa Youth Shelter.
- Store Sales or Ticket Proceeds: Love shopping for a cause? Donate a percentage of store sales or event ticket sales to Casa Youth Shelter, to make every purchase go even further.

# Casa Youth Shelter Third-Party Fundraiser Policies and Agreement

Casa Youth Shelter has a fiduciary duty to ensure:

- Our name and brand are being used properly.
- Funds are handled and accounted for in a reasonable and responsible manner.
- Fundraising events are conducted in a manner consistent with Casa Youth Shelter's mission and public image.

If we have concerns about your event and our concerns are not addressed immediately, we reserve the right to withdraw the use of our name and logo and cancel this agreement with no penalty to Casa Youth Shelter.

## Event Review and Approval

Fundraising for Casa Youth Shelter is subject to review by Casa Youth Shelter staff. Therefore, it is important that you complete and return your Third-Party Event Application and receive written approval prior to publicizing, promoting, or conducting your event. Please allow at least four weeks for Casa Youth Shelter staff to review and respond to your proposal.

Each proposal will be reviewed for compatibility and alignment with Casa Youth Shelter's mission, goals, and objectives.

If your Third-Party Event is approved, you will receive a written letter of authorization from Casa Youth Shelter for the date of the event.

If changes need to be made to the fundraiser (i.e.: location, date, type of event), additional approval from Casa Youth Shelter is required.

It is rare that third-party fundraising events are not approved. Casa Youth Shelter reserves the right to deny your event if we feel the event is inappropriate or directly conflicts with one of our signature events. You will receive written notice if your event is not approved.

## Liability

Third-party fundraising event or activity sponsors and their volunteers must comply with all federal, state, and county laws and regulations, as well as local municipality ordinances including but not limited to registering with the appropriate agencies, following IRS rules of disclosure, and obtaining required licenses (such as a raffle license) or permits.

At the discretion of Casa Youth Shelter, you may be required to obtain any necessary insurance, in the amounts and according to terms identified by Casa Youth Shelter; and if so required to provide proof of such insurance naming Casa Youth Shelter as an additionally insured entity no later than 10 days following the signing of this Agreement.



The third-party entity shall indemnify and hold harmless Casa Youth Shelter, its officers, employees, and agents from any and all claims, suits, actions, causes of action, liability, loss, damages, costs, and expenses, including attorney fees and costs, which are sustained, incurred or required and which arise out of the acts or omissions of any guest, participant, organizer, visitor, vendor or other person planning, organizing or attending the sponsored event at issue; and that the third-party entity shall do so regardless of whose act, omission or conduct is a cause or is the cause of the obligation to pay; and including all such damages that the third-party entity including its officers, employees and agents or that Casa Youth Shelter including its officers, employees and agents become obligated to pay. This provision shall survive the termination of this Agreement.

## **Event Promotion and Logo Use**

### *Event Promotion*

Casa Youth Shelter will not purchase advertising to promote third-party fundraisers. Casa Youth Shelter will advertise the event via its social media platforms one (1) time, possibly more, if time and scheduling allows.

Casa Youth Shelter cannot guarantee media coverage for third-party fundraising events or activities. Any contact with the media must be coordinated with Casa Youth Shelter.

### *Logo Use*

The name(s) and logo(s) are service marks of Casa Youth Shelter and cannot be used without written permission from Casa Youth Shelter. The names and/or logos of Casa Youth Shelter must be used as provided. The approval of the use of Casa Youth Shelter's name(s) and/or logo(s) expires at the conclusion of the event. If you wish to use the Casa Youth Shelter name(s) and/or logo(s) following the conclusion of your event, you must seek additional approval from Casa Youth Shelter.

Casa Youth Shelter must approve all pieces bearing the Casa Youth Shelter name and/or logo before they are printed or distributed. This includes, but is not limited to, electronic promotions, websites, social media posts, blogs, e-newsletters, press releases, invitations, brochures, letters, and flyers.

In order to use Casa Youth Shelter's branding (i.e.: name, logos, images, letterhead, etc.) for the purposes of soliciting prizes, favors, sponsorships, underwriting, or cash donations from another organization, group, or individual in order to support or promote the event or activity, prior written permission and approval must first be obtained from Casa Youth Shelter.

Any promotional materials must clearly state that your event is raising funds to benefit Casa Youth Shelter. Please contact us for proper wording regarding a specific entity or department.



## Financial Guidelines

Fundraiser organizers are responsible for covering all expenses, including any necessary license or permit fees, and will not be reimbursed by Casa Youth Shelter.

Casa Youth Shelter cannot provide our tax exemption number for use by the event organizers.

The anticipated amount or the percentage of monies raised that will benefit Casa Youth Shelter must be clearly stated in all pre- and post-fundraising advertising or announcements so donors are aware of the percentage of their donations that will directly benefit Casa Youth Shelter mission.

In order to avoid any over-lapping or duplication of fundraising efforts, third-party fundraiser sponsors must coordinate with and request permission from Casa Youth Shelter before soliciting any individual, organization, foundation, or business for financial or other considerations in support of the fundraising event or activity.

The sponsoring organization, group, or individual will submit net event proceeds to Casa Youth Shelter within 30 days of the event, unless a different date was previously approved.

## Tax Deduction and Donor Acknowledgement

Donors to third-party fundraisers who request a receipt for their donation(s) must make checks payable to **Casa Youth Shelter** and provide a first and last name, phone number, and an email and/or standard mailing address.

Credit card donations can be made online through Casa Youth Shelter's online donation page. A thank you letter and receipt will be emailed.

Cash donations collected at the third-party fundraising event or activity must be delivered to Casa Youth Shelter with a list of the donors, their email(s) or standard mailing address(es), and the specific amount(s) of their donation. Donations will be processed, and thank you letters and receipts will be emailed. Unspecified cash donations will be collected as an anonymous gift.

A participant or donor must be informed that the tax-deductible portion of their payment is only the amount that is over and above what was received in goods or services. For example, if a participant pays \$100 to play in a golf outing and the cost of the golfer is \$75, then the tax-deductible amount is \$25.

Please call Casa Youth Shelter with questions regarding tax deductions or donor acknowledgements.

## Role of Casa Youth Shelter

Casa Youth Shelter is able to provide the following once your event has been approved:

- Letter stating approval of the event
- Casa Youth Shelter's logo for use on your event's promotional materials
- Event information listed on our website
- Casa Youth Shelter promotional and educational materials, such as flyers, brochures, and donation envelopes
- Tax receipts, if applicable
- Recognition of the event through opportunities such as check presentations, social media posts, or newsletter or website articles and/or photos (We reserve the right to determine the appropriate platform(s) for recognition)

When possible, Casa Youth Shelter employees and/or volunteers may be available to work or appear at third-party events or activities. Requests for Casa Youth Shelter staff or volunteer assistance at the event should be made as far in advance as possible.

Casa Youth Shelter is **unable** to provide the following:

- Organization of event, such as location or venue
- Administrative functions, such as materials design, accounting, managing invitation and attendance lists or mailings, etc.
- Media coverage or external promotion (i.e.: press releases, newspaper ads, etc.)
- Funding or reimbursement for event expenses
- Mail or email lists (i.e.: donor lists, volunteer lists, client lists, etc.)
- Application for gaming licenses for bingo, raffles, etc.
- Prizes, auction items or awards

Casa Youth Shelter reserves the right to decline or cancel participation in a third-party fundraising event for any reason at any time.

### Third-Party Fundraiser Agreement

With my signature below, I certify that I have read and understand the rules and policies for conducting a third-party fundraiser. I assure that the Casa Youth Shelter name and associated logos will be properly used, funds will be handled and accounted for in a responsible manner, fundraising will be conducted in a method that is consistent with the public image of Casa Youth Shelter, and that those associated with the event or activity will act in accordance with all municipal, state, and federal laws. I understand that at any time Casa Youth Shelter can withdraw its consent for the event or activity at any time and for any reason.

\_\_\_\_\_  
Signature of Contact Person/Responsible Party

\_\_\_\_\_  
Event Date

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Print Name of Organization

**Please keep a copy of the policy and completed proposal for your records.**



### Third-Party Fundraiser Proposal Form

This form serves as an agreement between the Sponsor and Casa Youth Shelter to set forth the terms and conditions of our relationship in respect to the fundraising event described below.

Please return this form to Casa Youth Shelter for approval at least four (4) weeks prior to the event.

Contact Name: \_\_\_\_\_

Organization Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Website: \_\_\_\_\_

Please tell us why you chose to support Casa Youth Shelter in our efforts to help youth in crisis.

#### Event Information

Name of Event: \_\_\_\_\_

Event Date(s): \_\_\_\_\_ Event Time(s): \_\_\_\_\_

Event Location: \_\_\_\_\_

Estimated financial donation to be raised for Casa Youth Shelter: \_\_\_\_\_

Estimated number of event participants and attendees: \_\_\_\_\_

Please describe your fundraising event or activity including all parties involved with the event.





Please describe how you will promote your event (e.g. social media, advertising). NOTE: You must submit copies of materials to be used such as invitations, flyers, brochures, signs, and advertising content before issuing, publishing, or distributing these materials:

Would you like Casa Youth Shelter to supply you with any informational materials detailing our programs and services? Yes / No

What type of presentation and/or day-of assistance, if any, are you requesting from Casa Youth Shelter?

With my signature below, I certify that I have received a copy of Casa Youth Shelter Third-Party Fundraising Event Guidelines, and agree to the terms and conditions outlined.

\_\_\_\_\_  
Signature of Contact Person/Responsible Party for Event

\_\_\_\_\_  
Date

\_\_\_\_\_  
Print Name

**Please keep a copy of the policy and completed proposal for your records. Please return the signed agreement page and proposal form:**

Mail to:

Fund Development Department  
Casa Youth Shelter  
10911 Reagan St.  
Los Alamitos, CA 90720

Or email to: [LCrozer@casayouthshelter.org](mailto:LCrozer@casayouthshelter.org)

